

## **Historic, Archive Document**

Do not assume content reflects current scientific knowledge, policies, or practices.



# foreign agriculture circular

coffee

---

Approved by the World Food and Agricultural Outlook and Situation Board • USDA

---

FCOF 2-81  
April 1981

## FOURTH ESTIMATE OF 1980/81 WORLD COFFEE CROP RAISED BY 500,000 BAGS

### Summary

The fourth USDA estimate of the 1980/81 world coffee crop is 80.7 million bags (60 kilograms each). This is about 500,000 bags above the third estimate, but 700,000 bags below the revised estimate for 1979/80 of 81.4 million bags. Based on past performance, the chances are two out of three that this fourth estimate of total production will not vary by more than 4.3 percent from the final outturn for the year.

Exportable production, which is the harvested production less domestic consumption in producing countries, is estimated at 60.5 million bags. This is 1.8 percent lower than the estimate of 61.6 million bags for 1979/80.

Production prospects have improved recently in spite of weather-related downward adjustments totaling 237,000 bags for Costa Rica, Mexico, and Honduras bags more than offsetting the larger production estimate indicated for El Salvador, although that estimate is tenuous because of the political situation there; and for Colombia and Peru where harvesting will occur on a larger hectarage than previously believed. Also, higher crop estimates for several African countries, led by the Ivory Coast and Madagascar, more than offset reduced estimates for India and Indonesia.

U.S. imports of green coffee in calendar 1980 were 18.2 million bags valued at \$3.9 billion. This is down 6.2 percent in volume, but up 2.6 percent in value compared to 1979 imports of 19.4 million bags valued at \$3.8 billion. U.S. green coffee roastings in 1980 were 17.0 million bags, about the same as in 1979. Green coffee stocks on December 31, 1980 were 2.8 million bags, up 11.6 percent from inventories at the end of 1979.

## Production

### NORTH AND CENTRAL AMERICA

North and Central America's coffee production for 1979/80 is now estimated at 15.411 million bags, with exportable production of 11.957 million bags. Estimates of the region's 1980/81 production have been lowered by 128,000 bags, to 14.962 million bags, with exportable production of 11.353 million bags.

The estimates for Costa Rica and Honduras were reduced by 90,000 bags and 47,000 bags, respectively, due to heavy year-end rainfall which caused substantial berry drop. Mexico's estimate has been reduced by 100,000 bags because of lower yields in the principal coffee producing state of Chiapas. The estimate for El Salvador has been raised by 100,000 bags, partly because actual production figures have been understated over the past several years.

In Costa Rica heavy rains in December 1980 reduced the 1980/81 (October/September) coffee estimate to 1.79 million bags, or 90,000 bags (5 percent) below the last estimate. But this was still nearly 300,000 bags above 1979/80 crop output. As of January 31, 1981 about 86 percent of the estimated 1980/81 crop had been picked.

Under the economic provisions of the International Coffee Agreement (ICA) negotiated last September/October, Costa Rica was given a 1.5 million bag export quota. This was subsequently cut to about 1.38 million bags, or about 77 percent of current production. Since domestic consumption accounts for only 13 percent of the crop, 9 percent or about 160,000 bags could be expected to go into stocks. However, there are reports that some Costa Rican coffee is moving illegally across the border into Panama where prices are more attractive and payment is in U.S. dollars. Both countries have reportedly established border patrols curtail these movements.

It is now estimated that El Salvador's 1980/81 (October/September) harvest will total 2.5 million bags, up 100,000 bags from the previous estimate. The final outturn will depend upon the presence or absence of terrorist activity at the finca (farm) level and the willingness and financial ability of growers to finance third and fourth pickings. The 1979/80 crop estimate has been raised nearly 400,000 bags to 3.122 million bags because statistical evidence (exports and carryover stocks) indicated a substantially larger crop.

Prices offered producers by El Salvador's National Coffee Marketing Board (INCAFE) have remained fairly stable for the past several months. They have been about 96 cents per pound, green bean basis, for Central Standard type coffee, or 16 cents per pound below stated production costs.

INCAFE reports rust has been found in three coffee growing areas of the country encompassing 16,700 hectares, but that only 2,250 to 2,800 hectares are actually infested with rust spores. The Government is cooperating with producer groups, under the leadership of the Instituto Salvadoreno de Investigaciones de Cafe (ISIC), in a quarantine and rust control program covering over 1,700 hectares. The area covered under the program will be expanded.

U.S. Department of Agriculture • Foreign Agricultural Service • Washington, D.C.

# foreign agriculture circular

## coffee

---

Approved by the World Food and Agricultural Outlook and Situation Board • USDA

---

FCOF 2-81  
April 1981

### ERRATA

FOURTH ESTIMATE OF 1980/81 WORLD COFFEE CROP  
RAISED BY 500,000 BAGS

PAGES 16 AND 17 HAVE BEEN REVERSED.



Estimated cost per chemical treatment is 114 colones (US\$46) per hectare. Up to four treatments are required per season. Although the 1980/81 coffee crop is not believed to have been seriously affected, the disease could spread rapidly in the future, straining the financial ability of the country to combat it.

INCAFE reported the export of 479,529 bags of coffee during October/-December 1980, substantially less than the 848,031 bags credited to the period by the ICO. The difference is partly explained by the fact that INCAFE considers 368,502 bags of coffee as exported in September, a non-quota month, rather than during October, a quota month.

El Salvador's coffee sales during 1980/81 will be limited mostly to quota markets and, therefore, to about 2.2 million bags. This compares to exports totaling 2.7 million bags during 1979/80. If exports are limited to 2.2 million bags, carryover stocks will rise to about 900,000 bags on September 1, 1981, up 100,000 bags from a year earlier.

Guatemala's 1979/80 and 1980/81 crop estimates remain unchanged at 2.647 and 2.6 million bags, respectively.

Roya (coffee rust) first made its appearance in Guatemala in December 1980. There have been claims by the Government that the disease was spread by groups interested in creating political and economic problems for the country, since the pattern of growth did not correspond with that observed in other countries. So far seven areas of infection have been delineated. A joint Mexican-Guatemalan Roya Commission has been formed to identify, combat, and contain the disease. While some success has been claimed, the Commission believes that, at best, the containment action will only delay the spread of the disease to the highly susceptible Arabica varieties grown in Guatemala.

Although roya is present in Guatemala, it will have only minimal effect on the 1980/81 harvest. Much more important are the kidnappings, murders, extortions, burnings (fields and facilities), and payroll robberies attributed to political guerillas and "common bandits" that interfere with normal coffee production and marketing. These activities and the decline in world coffee prices over the past year have placed coffee producers in a cost/price squeeze.

Preliminary figures indicate that Guatemala exported about 2.145 million bags of coffee during 1979/80 (October/September), including 5,112 bags of green coffee equivalent of soluble coffee. After two reductions and conditional retentions, Guatemala's 1980/81 ICO coffee export quota is 1,931,284 bags. Guatemalan exports during the first quarter of 1980/81 (October/December) were reported to total only 228,471 bags.

The 1980/81 (October/September) Honduran coffee harvest is currently estimated at 1.265 million bags, or 126,000 bags above the revised estimate of 1.139 million bags for 1979/80. Although the 1980/81 harvest is well above last year, it is considerably below previous expectations. In late December and during the first half of January, unusually heavy rainfall caused some berry drop. Because of relatively low world coffee prices, credit to finance the harvest has been scarce. This has caused some reduction in the harvest.

Exports in 1980/81 are expected to total about 1,035 million bags, including a small quantity to countries which are not members of the 1976 ICA. During 1979/80 exports reached 980,318 bags.

New agrarian reform legislation has been introduced to provide land titles to Honduran coffee growers using national and municipal lands. Established growers would be permitted to purchase land for the nominal price of 60 lempiras (US\$30) per manzana (1 manzana=82.5 hectares). The bill will affect a minimum of 9,000 growers, or 20 percent of the total. The process will require some surveying to settle conflicting claims before lawyers present their petitions to the National Agrarian Institute (INA). As an added feature, producers working less than five hectares will not be subject to expropriation.

Much of Honduras' coffee area now needs to be replanted to prevent destruction by coffee rust. Under local banking laws, only growers who have title to their lands are eligible for long term loans necessary for capital improvements. As a result of the reform legislation, financing would become available for the first time to thousands of small coffee producers.

Production of green coffee in Jamaica for 1979/80 (October/September) is estimated at 34,000 bags, up from only 14,000 bags for the previous crop year. Flowering and moisture conditions for the "good year" in an alternating production cycle, the increased availability and use of fertilizer, and a wide effort to control coffee berry borers were the principal factors which led to the record harvest. However, these factors do not apply to the 1980/81 crop and, in addition, hurricane Allen damaged some of the coffee trees. Consequently, the 1980/81 crop is not expected to exceed 26,500 bags.

Various loan programs have been established in Jamaica over the past two years, perhaps stimulated by the small size of the 1978/79 harvest. Reportedly, JM \$1 million (US\$1.00=JM\$1.76) has been or will be made available to coffee growers each crop year (1979/80-1981/82), by the Crop Industry Board. The farmers can use this money to establish new plantings and better maintain those which already exist. Financing will come from the Board's reserve fund. Repayment is to be made over a 10-year period, with the first of seven installments beginning on the fourth anniversary of the loan. Existing plans call for financing the planting of an additional 1,000 hectares over the next 5 years.

Since 1973 Japanese interests have financed the planting of at least 200 hectares of coffee in Jamaica, mainly in the Blue Mountain area. Up to an additional 400 hectares may eventually be planted in the same area under another Japanese proposal. Finally, the U.K. Commonwealth Development Corporation is also willing to finance the development of over 500 hectares of coffee, in the Blue Mountain area.

Coffee berry borers are the principal disease and insect concern. The borer was first discovered in June 1978, with the highest level of incidence occurring in the Parishes of Clarendon and St. Ann. Other than in the Blue

Mountain area, few positive efforts to control the pest were taken until heavy losses were incurred in the 1978/79 coffee harvest. Through the use of sprays under the guidance of foreign specialists, the 1979/80 harvest was spared all but minor damage. However, the 1980/81 crop losses and damage are expected to be up considerably because the infestation has spread to the parishes of St. Catherine and Manchester and there has been a lack of funds for spraying.

For clean green coffee from the 1979/80 harvest, producers received an average of JM \$2.60 per pound, up from JM \$2.44 the preceding year. So far, only an advance payment of JM \$1.20 per pound has been authorized for 1980/81, indicating that producers are going to receive less for this year's harvest.

Because more coffee is available from national production, domestic consumption in Jamaica has risen from around 9,000 bags in 1978/79, to about 11,500 bags in 1979/80. At the same time imports of instant coffee were down 64 percent (from 2,221 bags to 806 bags on a green bean basis). Total domestic consumption is expected to rise to about 12,700 bags during 1980/81, due to lower retail prices and imports of about 3,000 bags mainly from Haiti and Trinidad.

Around 80 to 85 percent of the coffee consumed in Jamaica is in a soluble form. This is a considerable increase over recent years. Production of soluble coffee is estimated to have increased from 8,748 bags green bean equivalent (GBE) in 1979, to about 10,740 bags in 1980. It may rise to 20,000 bags if the Salada Food Corporation can find market outlets for the increased output. Roasted and ground production, which rose from the GBE of 1,423 bags in 1979 to about 1,780 bags in 1980, may grow to 2,700 bags in 1981.

With increased supplies to draw from, exports in 1980 rose to around 14,400 bags. A further increase, to around 20,000 bags, could occur in 1981 if there is a drawdown on stocks. Calendar year 1981 exports are expected to include a substantially larger proportion of soluble coffee than in 1980.

Japan is the principal green bean market, while the United States takes a major portion of Jamaica's soluble production. Jamaica receives a premium price for "Blue Mountain" coffee from the Japanese. All other coffees are sold at the prevailing world market price.

The estimate of Mexico's 1980/81 coffee production has been reduced 100,000 bags to 3.6 million bags, essentially unchanged from 1979/80. The reduction in the estimate is due to lower yields in the state of Chiapas and the Soconusco area in particular. According to a study by the Instituto Technologico & de Estudios Superiores de Monterrey the lower yields in these area cannot be attributed to the pesticide spraying program to control the Mediterranean fruit fly. The study also concludes that the spraying has not led to the various pest-related problems encountered by coffee growers in Chiapas.

After revision, Mexico's annual coffee export quota as of January 1, 1981 was 2,025,890 bags. Based on a 3.6 million bag harvest, Mexico should be able to fill its 1980/81 ICO quota and add 150,000 bags to stocks, even if domestic consumption rises by 110,000 bags during the year, as expected.

During the October-December quarter of the 1980/81 coffee marketing year, Mexico exported 373,269 bags of coffee (GBE), more than 80,000 bags less than its authorized 456,108 bag quota for the period.

Nicaragua's 1980/81 coffee harvest is still expected to reach 1.05 million bags, 41,000 bags above the current estimate of 1.009 million bags for the preceding year. Factors that might lessen the size of the 1980/81 coffee harvest are labor shortages and the light weight of coffee cherries being harvested in some areas.

The Government's campaign to eradicate coffee rust in the Pacific coast zone of Carazo is not going well. Originally, the plan was to strip 14,000 manzanas (24,000 acres) of infected trees and replant the area with 50 million rust-resistant seedlings. COMARCA, the Government agency established to carry out the campaign, has so far stripped only 10,000 manzanas (17,200 acres), and replanted only 12 million seedlings on 3,600 manzanas (6,200 acres). Only 60 percent of the new seedlings are expected to survive. Removal of most of the vegetation in the stripping process led to wind and water erosion and denied the seedlings the shade they need to grow. Reportedly, producers would have preferred a less expensive containment program.

If a harvest of 1.05 million bags is realized, about 965,000 bags would be available for export; however, Nicaragua has traditionally had too few non member markets to permit shipments much over its revised annual ICO export quota of 734,767 bags (as of January 1, 1981). Consequently, in-country exportable stocks will probably increase by about 125,000 bags between October 1, 1980-October 1, 1981.

The 1980/81 (October/September) green coffee crop in Panama is estimated to be a record 126,000 bags, up 16,000 bags from 1979/80. The increase is mainly due to the normal cyclical pattern of production, but some credit can be given to Government programs. Efforts to renovate 1,300 hectares of old coffee plantations, over a 3-year period that began in 1979 are continuing. The majority of the plantations to be renovated are located in Chiriquí Province where more than half of Panama's coffee is grown. This program, coupled with improved cultural practices, could lead to a considerable increase in coffee output over the next few years.

At present, between 10,000 and 15,000 bags of green coffee equivalent are consumed on farms annually by producers. In addition, the Government requires that off-farm domestic allocations for high quality coffee be met before exports are authorized. Normally, 40 percent of the marketed portion of Panamanian production, plus non export quality coffee, are assigned to the domestic market. However, during 1979/80 domestic supplies were short because a portion of the export quality coffee assigned to the domestic market reportedly was illegally exported to take advantage of the more favorable world price. As a result, an estimated 5,000 to 10,000 bags of replacement coffee was imported from Honduras and other neighboring countries to cover the deficit.

Panama exported about 53,000 bags of coffee during 1979/80, 15,000 bags more than in 1978/79. The 1980/81 crop should make it possible for Panama to cover its domestic market needs, as well as meet the minimum annual ICO quota of 57,400 bags.

## SOUTH AMERICA

Total production of coffee in South America in 1980/81 is estimated at 37.9 million bags, with exportable production at 26.6 million, compared with estimates of 38.7 and 27.4 million bags, respectively, for 1979/80. The major revisions in estimates are for Peru and Colombia. Together their estimates have been revised upward by 275,000 bags because production in both countries is now expected on larger hectarages than previously anticipated.

Bolivia's 1980/81 (April/March) coffee crop is now placed at 145,000 bags, up marginally from the 137,000 bags produced the year before. A further rise to 150,000 bags is forecast for 1981/82. Some expansion in area and Government programs are credited with the 30 to 35 percent growth in output which has occurred over the past 5 years. The Comite Boliviano de Cafe (COBOLCA) continues to provide producers with improved seedlings to replace and upgrade existing tree stock. Some 5.6 million seedlings were distributed during 1980.

Rust continues to pose a threat to coffee production in Bolivia, most seriously in the Caranavi zone. Emphasis has shifted from eradication of the disease to control. Most of the seedling varieties being distributed by the Government have some rust resistance. Experimentation is underway to develop even more rust-resistant varieties for distribution.

Brazil's 1981 (1981/82) coffee crop is estimated at between 31 and 33 million bags, 50 percent over its 1980 (1980/81) coffee harvest of 21.5 million bags. Official data on Brazil's planted and harvested area are not available, but information from grower cooperatives and trade sources suggest that Brazil's 1980/81 crop was harvested from about 2.8 billion trees and about 350 million trees planted 3 or 4 years ago will begin to produce significant quantities during 1981/82. USDA estimates of area and tree numbers for 1979/80-1981/82 are as follows:

Area	1979/80	1980/81	1981/82
	Estimate	Estimate	Forecast
-----1,000 hectares-----			
Planted	2,980	3,020	3,020
Harvested	2,460	NA	NA
<u>Tree Population</u>			
-----Millions-----			
Bearing	2,600	2,800	3,150
Non bearing	800	650	300
Total	3,400	3,450	3,450

With the exception of a few areas in the states of Parana and Sao Paulo where coffee trees are in the "off year" of their production cycle, trees in the three principal producing states of Sao Paulo, Parana, and Minas Gerais will bear close to their capacity during 1981, given their age and variety as

well as agronomic conditions. The large size of the harvest clearly reflects the nearly optimal weather which has prevailed since last September and reasonably good grower management. Current production estimates for Brazil's 1981/82 coffee crop, by producing state, are as follows:

State	<u>Millions of bags</u>
Parana	7.5- 8.0
Sao Paulo	9.5-10.0
Minas Gerais	10.0-10.5
Other states	4.0- 4.5
Total	31.0 33.0

The large 1981/82 harvest, which will provide substantial relief from the current tight supply situation, has resulted in considerable part from the efforts of the Brazilian Coffee Institute (IBC) to replace more than half of the country's coffee trees after they were lost or severely damaged by the catastrophic freeze of 1975.

During 1980/81 (July/June), Brazil's exports are expected to total 16.5 million bags, including 14.0 million bags in the green form and the equivalent of 2.5 million bags in soluble form. While the soluble equivalent can be expected to remain unchanged at 2.5 million bags in 1981/82, green bean exports should rise to 15.0 million bags bringing that year's export total to 17.5 million bags.

Brazils ICO export quota for the first quarter of the 1980/81 marketing year (October 1980/September 1981) was met, and perhaps exceeded. Further sales to ICO importing members were suspended as of January 19, 1980 when Brazil's quota for these countries was exhausted. However, shipments to quota markets under signed contracts are continuing, as are sales to non-quota countries. Registrations are now open for shipments of green and soluble coffees to all destinations for the second quarter of 1981.

Shipments of soluble coffee were substantially lower during the first few months of the 1980/81 marketing year (July/June) than for the preceding year because of non competitive export prices set by the IBC. The Government of Brazil estimates foreign exchange earnings from coffee will decline from US \$2.8 billion in 1980 to US \$2.4 billion in 1981, even though exports will rise by 2 million bags.

The IBC has announced its intention to completely estimate the Government's subsidy to Brazilian coffee roasters as of July 1, 1981. As of that date, they will pay the prevailing market price for coffee destined for the domestic market. Brazil's domestic consumption during the 1980/81 and 1981/82 marketing years is estimated at 8.0 and 8.5 million bags, respectively.

Coffee stocks are expected to fall below 5.5 million bags on June 30, 1981 or before the 1981 crop stocks are counted. This is a critically low reserve compared with the nearly 70 million bag inventory held in the early Sixties. A mild winter this year would ensure a relatively good harvest in 1982 and permit a gradual buildup in reserve stocks. However, should the trees suffer frost damage during June-August 1981, the 1982 crop would be reduced in proportion to the severity of the damage. In this case, the larger 1981 crop can be counted on to help cover supply requirements for consumption and exports until mid-1983.

The Colombian coffee production estimate for the current marketing year (October 1980/September 1981) has been increased to 12.6 million bags. This is 200,000 bags higher than the previous estimate, but 112,000 bags less than the revised estimate for the previous year.

According to the Technical Division of the Coffee Growers Federation (CGF) and information available from the Coffee Extension Service, 1,175,547 hectares were planted to coffee in 1979/80, including 860,760 hectares under the traditional tree-shaded culture, and 314,787 hectares under the high density, sun-grown, modern culture. The 314,787 hectares included 91,099 hectares which were nonproductive because of immaturity or had not recovered from pruning undertaken because of declining yields (usually 8 to 10 years after planting or the previous pruning).

Colombia's 223,743 productive hectares under modern culture contributed 51.3 percent of the 1979/80 harvest for an average yield of 1,750 kilograms per hectare, against 431 kilograms per hectare from traditional plantings. It is assumed that early 1970's yields from traditional plantings were maintained during the second half of the 1970's through better farm management practices.

Institutional credit for the planting of new coffee areas was eliminated in March, 1978. Since then, renovation of traditional plantings has been emphasized. In part this action was taken to increase the efficiency of older plantations to compensate for any rise in production costs if an outbreak of coffee rust took place. In 1980, growers could obtain up to 70,000 pesos (about US\$1,475) per hectare for renovating up to 5 hectares, 20,000 pesos and 3 hectares more than in 1979. A new credit line of up to 500,000 pesos (about US\$10,535) was also introduced at that time to finance required pruning for up to 10 hectares of high-yielding varieties. Pruned plantations remain unproductive for 1 1/2 to 2 years. During this period, twice-a-year fertilization is required in order to speed tree recovery.

The 37 percent increase in coffee output which has occurred over the past 5 marketing years has created some difficulties for onfarm processing, since credit for the purchase of the necessary facilities has not always been available. Soft water for processing has also become scarce, and this has reduced coffee quality. In addition, disposal of used water has created ecological problems in some of the country's main coffee producing areas.

The official support price to growers for each "carga" (125 kilograms) of parchment coffee remains unchanged at 9,200 pesos (about US\$178.95 at the current rate of exchange of 51.41 pesos to the dollar). During the first two weeks of January, growers received only between 8,574 to 8,850 pesos for their coffee from private buyers who pay cash and are less demanding in terms of quality than the CGF agents or cooperatives. Very often private buyers will provide transportation and other services to growers as an offset to the higher CGF price.

Preliminary figures indicate Colombian coffee exports during the first quarter of the 1980/81 marketing year (October 1-December 31, 1980), total 2.2 million bags, the lowest for any quarter in 4 years. The reduction reflects the fact that the country only has a 8.93 million bag annual export quota. Sales for the January-March 1981 quarter were halted in January when the quarter's quota was filled, but shipments have continued under signed contracts.

Legal exports reached 11,101,400 bags during calendar 1980, slightly below the 11,131,430 bags exported during 1979. The CGF handled 94.8 percent of such exports, leaving only 5.2 percent for the private trade.

Sales of Colombian coffee to the Soviet bloc during 1980 were disappointing at 332,000 bags, including 147,000 bags to East Germany, 143,000 bags to Poland, 22,000 bags to Czechoslovakia, 17,000 bags to the USSR, and 3,000 bags to Hungary. Measured against Colombia's large purchases of machinery for hydroelectric power plants, electric trolley buses, and other vehicles from the USSR, Russian coffee purchases, at only about 0.2 percent of Colombian exports, were regarded as rather insignificant.

On November 9, 1980 the Government of Colombia announced it would further encourage the processing and export of soluble coffee. While an investment of US\$20 million has been mentioned, no deadline has been set for the completion of this proposed quasi-governmental project. Annual Colombian exports of soluble coffee beginning with 1970 were as follows:

Calendar year	:	Green bean equivalent in 60 kilogram bags
1970		2,381
1971		12,815
1972		10,983
1973		15,193
1974		45,962
1975		49,335
1974		105,258
1975		174,962
1976		86,158
1977		138,413
1978		98,440 1/

1/ Based on preliminary data for October, November, and December.

Year-end coffee stocks on September 30, 1980 are now placed at about 3.90 million bags. At the end of the 1980/81 year, they are expected to be somewhat higher at about 4.17 million bags.

Peru's 1980/81 (April/March) coffee crop is now estimated at 1.1 million bags, 165,000 bags below the record 1979/80 harvest, but 75,000 bags above USDA's previous estimate. While a somewhat larger area came into production during the year due to new plantings, yields were sharply below those for 1979/80, especially in the Satipo area owing mainly to adverse weather. Although rust and insect damage also hurt the 1980/81 crop, there is optimism that such damage can be held to moderate levels in the future by regional farmers groups who are undertaking integrated control programs for both problems.

Between calendar 1979 and 1980, coffee exports declined from 1,158,000 bags valued at US\$244.8 million to 737,000 bags valued at US\$141.3 million. Coffee was Peru's largest agricultural export earner in 1980. However, its contribution to the total value of commodity exports dropped from 7.0 percent in 1979 to 3.6 percent in 1980. Exports during the April 1980/March 1981 crop year are expected to total about 850,000 bags, a significant drop from the record 1,052,000 bags exported in 1979/80.

Peru's coffee exports during 1980/81 (October/September) may be held down by reduced ICO export quotas. To compensate for this and to avoid a buildup in stocks, the country is seeking to sell increased quantities of coffee to nonquota markets, especially the Soviet Union. It probably will also press for an increase in its ICO quota.

A growing population and stable prices are believed to have led to some increase in domestic consumption of coffee over the past year which may rise to 260,000 bags from a stabilized level near 250,000 bags.

Because of declining world coffee prices, the Government approved the Agricultural Promotion Law of November 25, 1980 which reduced the export duty on coffee from 17.5 percent to 12.5 percent of the export value, through December 31, 1981. The rate will be further reduced to 8 percent in 1982, to 4 percent in 1983, and eliminated in 1984.

The Ministry of Agriculture is considering the creation of a Peruvian Coffee Institute which will have producer participation and will be in charge of coffee policy.

## AFRICA

Coffee production in Africa for 1980/81 is now estimated at 18.6 million bags, up 600,000 bags from the previous USDA estimate and 350,000 bags above 1979/80. Exportable production for the current year is estimated at 16.0 million bags, compared with 15.6 million bags for the past year.

Production was 334,000 bags above earlier expectations at 4.5 million bags in the Ivory Coast, where weather was nearly ideal. Favorable weather and the bearing of trees planted 5 to 6 years ago are the principal reasons Madagascar's coffee production estimate has been raised from 1.25 to 1.5 million bags for 1980/81. The estimate for Rwanda has also been raised by 200,000 bags to include coffee produced in neighboring countries. (FAS/USDA procedures are to credit production to the country from which exports occur if their origin cannot clearly be identified).

Increased production in some African countries was partially offset by a 300,000 bag reduction in the estimate for Uganda where farmers are producing more food and neglecting their coffee trees.

Angola's 1979/80 (April/March) and 1980/81 coffee crops, estimated at 300,000 and 350,000 bags, respectively, are a small fraction of the output which occurred during the late 1960's and early 1970's. However, the country still retains sizeable stocks (estimated at 1,896,000 bags on April 1, 1980 by the ICO) built up during years of higher production. These stocks are gradually being reduced. Most of the remaining stocks (1,701,000 bags) were reported to be of export quality and held in the port cities of Luanda and Porto

Amboim. In addition, there were unverified stocks totaling 195,000 bags located in inland warehouses. During 1980/81, exports and domestic consumption are expected to be more than double the level of production realized for the year, thus reducing stock levels to 1.3-1.4 million bags by April 1, 1981.

At 1.68 million bags, Cameroon's coffee production in 1980/81 is up slightly from the third estimate for the year, as well as marginally above the revised figure of 1.66 million bags for 1979/80. Cameroon produces both Robusta and Arabica coffees, with Robusta accounting for three-fourths of the total in recent years. The areas planted to Robusta and Arabica coffee are currently estimated at 250,000 and 100,000 hectares, respectively. There has been little, if any, increase in the area planted to coffee in Cameroon over the past 3 years.

A Presidential Decree dated December 27, 1980 fixed producer prices for 1980/81 crop coffee at 340 CFA/kg for Arabica and 320 CFA/kg for Robusta, both prices up 10 CFA/kg from the preceding year (227 CFA=US\$1).

The Government of Cameroon is attempting to increase food output, which is considered to include coffee. Farmers producing coffee can obtain fertilizers, fungicides, and seedlings free of charge from the Government, when available. The Government currently spends about 4 billion CFA annually under its coffee fertilization program.

Rising interest rates and high inflation, matched against fixed Government prices for coffee, reportedly have made coffee exports unprofitable. There are indications the Government is aware of the problem and will reimburse exporters for inflation-caused losses before the firms, mostly foreign, abandon the country. Exporters borrow money to pay planters and to process and transport the coffee to port well before they receive reimbursement from the Government. When reimbursement is made, it does not cover interest costs on money tied up during the interim.

Central African Republic coffee production is estimated at 235,000 bags for 1980/81, up 20,000 bags from the preceding year. The upward trend in the country's production could lead to a harvest of 300,000 bags or more within 5 years. Higher prices paid to planters since 1977 have led to an expansion in area, increased pruning, and improved cultural practices. The coffee promotion organization, Agence du Development de la Culture Cafeire (ADECAF) found small planters quite supportive of their extension service activities.

The 1980/81 coffee production estimate for Ethiopia remains unchanged at 3.1 million bags, while the estimate for 1979/80 has been raised by 125,000 bags to nearly 3.1 million bags. Accurate production estimates for Ethiopian coffee are difficult because the level and trend of domestic consumption is largely unknown. Ethiopia's foreign exchange earnings depend heavily on coffee exports, and expanded coffee production is viewed as necessary to increase such earnings. There is also an effort on the part of the Government to encourage the sale of washed coffees since they bring a higher return.

The 1980/81 (October/September) Ghanian coffee harvest is placed at 33,000 bags, down from 37,000 bags in 1979/80. These figures do not include an estimated 7,000 to 10,000 bags produced in Ghana but reportedly smuggled out.

All, or nearly all, of the coffee purchased by the Cocoa Marketing Board is exported. Private purchases for domestic consumption total only about 7,500 bags per year. The largest domestic processor grinds about 20 bags per day, or 5,000 bags per year. Coffee in Ghana is grown on an estimated 14,500 hectares dispersed throughout about 1.6 million hectares.

Low producer prices make it unlikely coffee production will expand in Ghana in the near future. The official purchase price for coffee is ₦210 for a 60 kilo bag, compared with ₦240 for cocoa. In addition, while the official exchange rate for the cedi is ₦2.75 for US\$1.00, the "black market" rate is between ₦23-₦25 for US\$1.00. Since most items reportedly are priced at the black market rate, Ghanian farmers do not seem to have much incentive to produce coffee.

The estimate of the 1980/81 Ivory Coast coffee crop has been revised to 4.5 million bags, up from the preceding estimate of 4.166 million bags and 9 percent over last year's crop. Favorable weather is believed to be the main reason for the larger than expected harvest.

All 16 new decorticating plants are now functional, and the entire 1980/81 coffee crop will be processed through them. Use of the new equipment for hulling coffee cherries has, however, reportedly reduced bean quality. Formerly, payment for dehulled coffee stocks held by growers was made on the basis of on site inspection by private buyers. Now growers sell their cherries in bulk at the decortication mills. Since the growers are not individually accountable for the quality of the beans which enter the marketing system, some grower deliveries may include poor quality cherries which would have been discarded under the previous hand selection system. The problem has grown because the farmers are now more inclined to strip-pick their coffee trees, rather than selecting only ripe cherries. Mechanical processors can remove most of the poor quality beans, but not all.

At 150 CFA/kilogram (US\$1=210 CFA), the grower price for coffee in the Ivory Coast is probably lower than it would be if only quality cherries were delivered to decortication mills. Still the new system has its benefits. Under the old system of onfarm hulling, producers averaged only 47 kilograms of green beans per 101 kilograms of cherry coffee hulled. With mechanical hullers, yields average 54 kilograms and the greater weight more than offsets the lower producer price. In addition, substantial savings in labor and time are involved. On a national basis, the extra weight adds 300,000 bags, valued at 12 billion CFA, to exports.

The Ivorian Government agency responsible for promoting coffee in growing regions is SATMACI. Their programs include extension service activities, insecticide subsidies, crop research, and bonuses for new plantings. Although most SATMACI expenditures are of a current nature, monies are appropriated in the Government investment budget. Based on budget figures, the Ivory Coast spent 4.3 billion CFA or the equivalent of 18.3 CFA/kilo (\$0.04/lb) for coffee produced in 1979.

According to SATMACI officials, only 5,301 hectares coffee plantations of a 7,500 hectare goal were regenerated under a Government program during 1979/80. An additional 10,000 hectares are programmed for regeneration during 1980/81.

Ivorian coffee exports are expected to total 3.85 million bags during 1979/80, including about 3.25 million bags to quota markets. The balance will go to nonquota markets in Eastern Europe, including the USSR, and Algeria. At 3.915 million bags, exports and domestic consumption will fall 600,000 bags below production for the year, thereby raising the level of carryover stocks on September 30, 1981 to about 2.0 million bags.

The 1980/81 (October/September) estimate of Kenya's coffee crop remains unchanged at 1.25 million bags. However, if the current drought ends the harvest could ultimately equal or exceed the 1.466 million bag harvest of 1979/80.

At the end of the 1979/80 marketing year (September 30, 1980), auction prices were at their lowest level in four years. As a result, Kenyan producers have been slow to make their coffee available for sale this year.

The 1980/81 coffee production estimate for Liberia has been reduced to 135,000 bags, or 13,000 bags below 1979/80, because coffee purchases which normally occur from January through April have been below expectations.

Under a bilateral agreement Liberia is reported to have arranged the sale of 2,000 tons of coffee annually to Libya over the next 5 years. The agreement is regarded as favorable for Liberia since Libya is committed to paying the average ICO price for Robusta coffee that prevails during the month preceding each shipment, whereas Liberian coffee normally sells at about 7 to 10 percent below the average ICO Robusta price. Shipments are to occur at the rate of 500 tons per month during June, August, October, and December, beginning in 1981.

In order for Liberia to meet its ICO quota (120,000 bags), as well as the Libyan shipments, the Liberian Produce Marketing Board (LPMB) would have to purchase at least 150,000 bags of coffee during the 1980/81 marketing year. This may be difficult in view of the Board's tight financial condition. Normally, coffee grown near the common borders of Guinea, Liberia, and Ivory Coast is attracted to the country where the best terms are offered. During the past few years Liberia has had this trade. However, this year LPMB, with a cash flow problem, has been unable to pay cash for coffee purchased, and has lowered coffee prices to 82 cents from the 90 cents per pound paid last year. If the Board is unable to purchase enough coffee to meet both the Libyan sale and the ICO quota for 1980/81, it may opt to meet the Libyan portion first on the basis of profitability.

Indications now are that Madagascar's 1980/81 coffee harvest will reach 1.5 million bags, up substantially from the 1.25 million bag third estimate. The major reason for the increase over the revised estimate of 1.35 million bags for 1979/80 is that about 26,000 hectares of coffee trees have recently come into production. These trees were planted 5 to 6 years ago under a coffee development program called "Big Operation." Favorable weather was also a positive factor in the higher 1980/81 output estimate, as were producer incentives, especially prices, which were raised from 185 CFA francs (215 CFAF=US \$1) per kilogram for the 1979/80 harvest to 215 CFA francs for the 1980/81 harvest.

Madagascar's 1980/81 coffee exports are expected to equal or exceed the 1 million bag level reached in 1979/80. Exports to East European markets are increasing and should exceed 100,000 bags during 1980/81. Even so, carryover stocks are likely to be 250,000 bags or more higher on April 1, 1981 than they were one year earlier.

Low world coffee prices are likely to prevent Madagascar from reaching its development plan goal of 2 million bags a year by 1985.

In Rwanda, the current coffee production estimate for 1980/81 (April-/March) of 527,000 bags includes an estimated 200,000 bags produced in Uganda, Burundi and Zaire. Rwanda's overland trade route through Uganda has been closed periodically because of political problems and risks to the security of the coffee shipments. This left a backlog of coffee at the time the ICO provisions for quotas were implemented on October 3, 1980 that was nearly equal to Rwanda's purchases from neighboring countries. Although Rwanda has requested a waiver of its quota for 1980/81, it is not likely to be granted. Therefore, substantial quantities of coffee will remain in Rwanda throughout the year.

Arabica coffee is Rwanda's most important export commodity, sometimes contributing more than 50 percent of the country's foreign exchange earnings. If world coffee prices remain at their present level and the ICO quota remains unchanged, the impact on the Rwandan economy will be significant.

The estimate for the 1980/81 (October/September) coffee crop in Sierra Leone remains unchanged at 180,000 bags, up slightly from the revised estimate of 172,000 bags for 1979/80. The United Kingdom is Sierra Leone's principal export market followed by the United States.

Coffee producer prices in Sierra Leone were raised on January 23, 1980 from Leones 1,727.20 per ton (75 U.S. cents per pound) to Leones 1,859.20 per ton (80 U.S. cents per pound). A further increase to Leones 2,016.00 per ton (86 U.S. cents per pound) was scheduled for February.

Coffee production in Togo should reach 160,000 bags during 1980/81 (October/September), down slightly from the 173,000 bag 1979/80 harvest, but up more than 50 percent from the 105,000 bags produced during 1978/79.

Grower prices for 1980/81 remain unchanged from 1979/80 at 200 CFA/kg, despite an annual inflation rate of about 10 percent. Lower real prices are, however, not likely to impair production from areas where Togo's aging coffee and cocoa trees have been replaced under a rehabilitation program begun in 1975. The program will be continued until 1985 under current plans.

Other than one small monastery which roasts and packages its own production for the local market, Togo's Robusta coffee is produced solely for export. Exports for 1980/81 are expected to total about 170,000 bags, 100,000 bags below Togo's ICO authorized export quota.

In the Philippines the San Miguel Corporation has entered into a joint venture with Nestle of Switzerland to put up a \$47 million integrated coffee processing plant. The raw material requirements of the proposed factory will be supplied by a plantation, which San Miguel is developing, on the island of Mindanao. Aside from the domestic market, outturn of the factory will be sold to neighboring Asian countries, including Mainland China. The factory will have an annual capacity of 2,200 metric tons of processed coffee.

In Papua New Guinea coffee production in 1980/81 is currently expected to total 840,000 bags. Production may be even greater than this, because there is an indication small planters are withholding their coffee rather than selling it at what they consider to be too low prices. The introduction of quotas and the bleak prospects for coffee prices are expected to make any further large increases in coffee production uneconomic. Evidence suggests, however, that the recent rate of new plantings far exceeds replacement, indicating that the potential for a short term expansion in production is considerable. Government sources expect coffee production to reach 1 million bags by 1985, according to the following growth pattern.

Year	Bags
1982	875,000
1983	933,000
1984	958,000
1985	1,000,000

#### INTERNATIONAL COFFEE AGREEMENT

Most of the matters considered by the International Coffee Organization's Executive Board over the past 6 months relate to the entry into force of quotas for coffee year 1980/81 (October/September). Major issues considered by the Board at its December 2-3, 1980 meeting were reviewed in FAS Circular FCOF 1-81.

The Board met again January 20-23, 1981. At that meeting numerous requests were heard, most of which required study before any action could be taken. A number of countries requested a redistribution of their quarterly export quotas so that they conform more closely to the patterns of their harvests. The six member African and Malagasy Coffee Organization (OAMCAF), which normally harvests nearly 70 percent of its coffee during October-March, requested authority to export 55 percent of its annual quota during that period. Requests were also received to increase the quarterly authorization for January-March 1981 from Ecuador (from 25 to 31 percent), Zaire (25 to 35 percent), and India (25 to 30 percent).

Kenya, Papua New Guinea, Ecuador and India requested permission to apply, in whole or part, the first downward adjustment to their second quarter quotas (January/March), rather than the first quarter (October/December) apparently because of overshipments for the first quarter due to bona-fide contracts held when the economic provisions of the 1976 Agreement were implemented on October 3, 1980. In addition, Brazil informed the Board that because of such contracts, entered into in early 1980, it expected to exceed its first quarter quota by 189,000 bags.

Uganda's 1980/81 coffee harvest has been reduced to 2.0 million bags, due to the need to produce food instead of coffee and the partial neglect of trees by some growers. The revised figure does not account for up to 300,000 bags of coffee smuggled to neighboring countries where prices are more attractive and basic consumer commodities are available at reasonable prices. The Ugandan shilling is worth only 1/12 to 1/15 of its face value on the open market.

The Obote Government is attempting to revive the country's commodity trade which declined dramatically under President Amin because of a lack of transport and fuel in rural areas and the failure of the Government to pay growers. Pledges of financial support for this effort have been received from the European Economic Community (EEC) and the World Bank.

## ASIA AND OCEANIA

Total coffee production in Asia and Oceania for 1980/81 is estimated at 9.2 million bags, with exportable production currently set at 6.6 million. This compares with total and exportable production of 9.1 million and 6.6 million bags, respectively, for 1979/80.

Indonesia's 1980/81 (April/March) harvest estimate has now been reduced to 5.16 million bags, down a little more than 100,000 bags from the preceding estimate but above the 4.80 million bags produced in 1979/80. Exports during the 1980/81 crop year are not expected to exceed 3.35 million bags, which would lead to a major jump in carryover stocks from about 400,000 bags on April 1, 1980 to more than 1.1 million one year later.

The larger carryover stocks, coupled with a 5.4 million bag harvest from the 1981/82 crop (assuming growing and harvesting conditions remain satisfactory), may lead to serious storage problems for the country, especially if it is unable to make sizable ICO nonmember sales. If three ICO quota cuts are imposed, Indonesia's export authorization for 1980/81 (October/September) could be as low as 2,823,292 bags.

Coffee production in Malaysia reached 148,000 bags in 1980/81 (October/September), up slightly from 145,000 bags in 1979/80. Malaysia produces Robusta type coffee on about 9,700 hectares. Peak production months are December/February and April/May. The state of Selangor on the west coast of peninsular Malaysia is the primary growing region. Plans to intercrop coffee with coconut palms have not materialized, since cocoa has proven to be a more attractive alternative for smallholder farmers.

While production has risen rapidly over the past decade, so has consumption. During 1980/81 Malaysians are expected to consume the green equivalent of 190,000 bags, nearly double the estimated level in 1970/71. The increase primarily reflects a 55 to 60 percent growth in per capita consumption. Malaysia's population now stands at 13.6 million.

Nearly half of the coffee consumed in Malaysia is imported. Malaysia's net imports of green and soluble (GBE) coffee during 1980/81 will total about 85,000 bags. Exports are expected to reach 50,000 bags. Coffee traders maintain that transshipments of coffee through Malaysia are negligible.

Several countries or groups of exporting member countries whose output has grown rapidly in recent years felt that their quotas for 1980/81 were inconsistent with their recent export performance and, therefore, requested quota increases. The major request received was from OAMCAF, which asked that its annual quota be increased from 6,661,666 bags to 7.0 million bags. Liberia also asked that its quota for the current year be increased from 120,000 to 204,000 bags. Several other countries, including Indonesia and Ecuador, also are known to be unhappy over their quota allocations.

Rwanda, a landlocked country, requested a waiver of its quota in order to dispose of stocks held on September 30, 1980 because of transportation difficulties through neighboring countries. El Salvador informed the Board that, due to the lack of internal security, it would be necessary to store its coffee in foreign warehouses from which it could then be released according to established quotas.

The Executive Board met again March 25-27, 1981, which was followed by a March 30-April 3 meeting of the International Coffee Organization's Coffee Council. Among the matters discussed at these meetings were plans for extending or renegotiating the current Agreement which ends September 30, 1982. Paragraph (3) of Article 68 of the Agreement provides that "the Council may at any time after September 30, 1981, by a vote of 58 percent of the members having not less than a distributed majority of 70 percent of the total votes, decide either that the Agreement be renegotiated, or extended, with or without modification, for such period as the Council shall determine."

Because the ICO's composite indicator price fell to US\$1.20, quotas for most of the larger exporters (Angola, Brazil, and Uganda were exempted because of provisional arrangements) were cut on November 19, 1980. Since the price remained below the US\$1.20 level for more than 20 consecutive market days the global quota was further reduced by 1.4 million bags on December 17, with the cut applied during the second quarter beginning January 1, 1981. In addition, a volume of coffee stamps were not released that corresponded to 2.4 percent of the first quarter quota, since at no time during the first quarter was the 20 day moving average of the composite indicator price at or above US\$1.35 per pound. This is termed a conditional reduction.

In addition to the conditional 2.4 percent reduction for the quarter and the second cut in the annual quota, stamps for a possible third cut were withheld when export stamps for the January-March 1981 quarter were issued. Stamps for the maximum possible downward adjustment for a quarter are held by the Executive Director until the first day of the seventh week of the last month for each of the first three quarters, and until the first day of the seventh week for the last quarter of the October/September coffee year. They then must be released if no further downward adjustments are likely during the quarter. At the January meeting several members of the Executive Board asked the Executive Director to release the stamps held against a possible third cut in the quota well ahead of the mandatory March 1 release date. The Executive Director declined to do this because, in his opinion, market conditions did not warrant an early release.

Tables 9 and 10 provide detailed information on the various adjustments to the annual quota for 1980/81 and for the January-March 1981 quarter. Other ICO statistical tables are also included.

All of the importing countries have or are now in the process of fully implementing the economic provisions of the 1976 ICA agreed to last October 3, as have all the exporters except Nigeria, which is actually a net coffee importer. On March 12 President Reagan signed Executive Order 1297 delegating to the US Trade Representative (USTR) authority granted him under the International Coffee Act of 1980 (P.L. 96-599). This was the last step that had to be taken before the United States could comply fully with the Export Controls System of the ICA.

Procedurally, USTR will now direct the Commissioner of Customs to enforce the quota system and limit coffee imports from countries not party to the Agreement. Customs Service field personnel will implement the system once their instructions have been published in the Federal Register. The United States may import any portion of the annual quotas authorized to exporting members, but must limit imports from nonmembers to 121,000 bags during 1980/81.

#### U.S. COFFEE TRADE

U.S. imports of green coffee during calendar 1980 totaled 18.2 million bags valued at \$3.9 billion, compared with 19.4 million bags valued at \$3.8 billion in 1979. In 1978 and 1977, the volumes of green coffee imported were 18.1 million and 14.8 million bags, respectively. Imports of roasted and soluble coffee in 1980, on a green bean equivalent basis (GBE), totaled 1.6 million bags valued at \$309 million. Comparable imports of processed coffee in 1979 were 2 million bags valued at \$337 million. For years 1977-1980, the average unit values per pound of green coffee imports, f.o.b. basis, were \$1.97, \$1.55, \$1.49, and \$1.61, respectively. During 1980 the average monthly import value was at its highest level in January at \$1.79 per pound. It remained above \$1.60 per pound through August, declining progressively thereafter to \$1.37 per pound in December. In January 1981, the average import price was \$1.35 per pound.

In 1980, the 10 leading suppliers of green coffee to the United States (in 1,000 bags, with 1979 quantities in parentheses) were as follows: Brazil 3,505 (1,890); Colombia 3,404 (3,891); El Salvador 1,374 (1,123); Mexico 1,337 (1,934); Indonesia 1,314 (1,294); Guatemala 926 (1,268); Peru 565 (954); Ecuador 539 (638); Ivory Coast 438 (844); and the Dominican Republic 343 (548).

The 10 largest suppliers contributed 75.7 percent of the green coffee imported by the United States during 1980. South America was the leading area of origin with 45.5 percent of the total.

Total exports of green and processed coffee in 1980 (in GBE) were 459,000 bags valued at \$125 million, compared with 1979 exports of 596,000 bags valued at \$145 million. Re-exports of green and processed coffee in 1980 (in GBE) were 1.2 million bags, about the same as in 1979.

According to U.S. Bureau of Census data, inventories of green coffee held by U.S. roasters, importers, and dealers on December 31, 1980 were 2,814,000 bags, down from 2,956,000 bags held on September 30, 1979, but 11.6 percent higher than inventories held at the end of 1979. Total green coffee roastings in 1980 were 17.0 million bags, the same as in 1979, but slightly higher than the 16.3 million bags roasted in 1979.

Based on U.S. Bureau of Labor Statistics data, the wholesale price of a one-pound can of roasted coffee during calendar 1980 averaged \$2.89, compared with \$2.74 in 1979, and \$2.86 in 1978. Similarly, the wholesale price of a 6-ounce jar of instant coffee averaged \$2.99 in 1980, \$2.83 in 1979, and \$2.86 in 1978. As of January 1980, the average wholesale price of a one-pound can of roasted coffee was \$2.53, while the 6-ounce jar of soluble was \$2.64.

#### PANCAFE

Reportedly all of the Robusta stocks held by PANCAFE have been sold, and that entity no longer holds any position in either the New York or London coffee exchanges. Stocks of Central American coffees in New York and Trieste have largely been sold. Whatever remains may be held until the frost threat in Brazil is over. The ICO Executive Director will be asked to report on the liquidation of PANCAFE holdings at the next ICO Executive Board Meeting in London on March 26 and 27, 1981.

#### National Coffee Association (NCA) Meeting

Representatives from 21 foreign nations and 167 member companies attended the 70th National Coffee Association Annual Convention held in Boca Raton, Florida February 9-12, 1981. The theme of the meeting was "Coffee 81: Confronting the Critical Issues." A principal concern expressed at this and other conventions has been the failure of coffee to hold its position among competing beverages, especially soft drinks. In the United States total coffee consumption is no higher today than it was in 1950, despite a 45 percent growth in population. The current level of wholesale and retail prices favors increased coffee consumption, but this advantage may be offset by changing taste patterns, reduced consumption in the industrial and institutional sectors, and the proliferation of high-yield blends which produce more cups of coffee per ounce.

Dr. Arturo Gomez, General Manager of the National Federation of Coffee Growers of Colombia and others scored the U.S. coffee industry for not promoting the unique properties of coffee, such as flavor and aroma, that could generate long term growth in sales. U.S. roasters were chastised for not having used advertising or public relations efforts to encourage increased consumption among the younger generation. European roasters reportedly spend 4 to 6 dollars more per bag on promotion than their American counterparts.

Information in this circular was prepared by C. Milton Anderson, Horticultural and Tropical Products Division, CP/FAS. Telephone (202) 447-2048.

TABLE 1-COFFEE, GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1971/72-1975/76, ANNUAL 1976/77-1980/81 1/
 (IN THOUSANDS OF 60 MILIGRAMS BAGS) 2/

REGION AND COUNTRY	AVERAGE 1971/72-1975/76	1976/77	1977/78	1978/79	1979/80	1980/81
<b>NORTH AMERICA:</b>						
COSTA RICA.....	1,413	1,331	1,449	1,749	1,507	1,790
CUBA.....	461	450	425	450	450	450
DOMINICAN REPUBLIC.....	862	728	1,025	767	889	850
EL SALVADOR.....	2,624	2,773	2,700	3,186	3,122	2,500
GUATEMALA.....	2,203	2,213	2,541	2,827	2,647	2,600
HAITI.....	577	486	519	443	664	485
HONDURAS.....	731	691	1,036	1,127	1,139	1,265
JAMAICA.....	26	23	45	45	38	7
MEXICO.....	3,756	5,330	3,401	4,141	3,610	3,600
NICARAGUA.....	693	852	967	1,004	1,009	1,050
PANAMA.....	77	78	101	108	110	126
TRINIDAD-TOBAGO.....	48	60	41	39	36	33
US-HAWAII.....	16	13	14	10	11	11
US-PUERTO RICO.....	195	145	199	159	183	200
<b>TOTAL NORTH AMERICA.....</b>	<b>13,679</b>	<b>13,167</b>	<b>14,441</b>	<b>16,024</b>	<b>15,411</b>	<b>14,987</b>
<b>SOUTH AMERICA:</b>						
BOLIVIA.....	99	108	118	122	137	145
BRAZIL.....	22,780	9,300	17,500	20,000	22,000	21,500
COLOMBIA.....	8,220	9,300	11,050	12,600	12,712	12,600
ECUADOR 3/	1,141	1,690	1,302	1,833	1,495	1,430
GUYANA.....	13	17	17	17	20	19
PARAGUAY.....	97	41	71	144	40	75
PERU.....	1,027	947	1,050	1,130	1,265	1,100
VENEZUELA.....	975	656	1,061	1,011	997	1,033
<b>TOTAL SOUTH AMERICA.....</b>	<b>34,452</b>	<b>22,059</b>	<b>32,169</b>	<b>36,857</b>	<b>38,666</b>	<b>37,942</b>
<b>AFRICA:</b>						
ANGOLA.....	3,106	1,131	1,047	648	300	350
BENIN.....	29	17	3	3	5	5
BURUNOI.....	373	359	285	387	466	333
CAMEROON.....	1,494	1,307	1,371	1,627	1,658	1,680
CENTRAL AFRICAN REPUBLIC.....	173	166	155	160	215	155
CONGO BRAZZAVILLE.....	16	33	46	107	43	58
EQUATORIAL GUINEA.....	107	90	80	90	100	100
ETHIOPIA.....	2,431	2,782	3,143	3,142	3,088	3,100
GABON.....	7	7	3	6	8	8
GHANA.....	63	70	32	31	38	33
GUINEA.....	59	39	16	59	34	70
IVORY COAST.....	4,534	4,867	3,395	4,616	4,120	4,500
KENYA.....	1,171	1,687	1,17	1,239	1,468	1,250
LIBERIA.....	10	10	17	14	18	15
MAURITANIA.....	1,119	984	1,292	726	1,350	1,500
NIGERIA.....	51	53	43	50	50	52
RWANDA.....	361	531	362	311	501	527
SIERRA LEONE.....	111	168	77	230	172	180
TANZANIA.....	884	805	835	856	809	860
TOGO.....	159	177	82	105	173	160
UGANDA.....	3,175	2,664	1,868	1,823	2,082	2,000
ZAIRE (CONGO-K).....	1,355	1,437	1,129	1,300	1,400	1,400
<b>TOTAL AFRICA.....</b>	<b>20,857</b>	<b>19,530</b>	<b>16,826</b>	<b>17,680</b>	<b>18,228</b>	<b>18,536</b>
<b>ASIA:</b>						
INDIA.....	1,506	1,813	2,083	1,842	2,500	2,160
INDONESIA.....	2,569	3,319	3,911	4,788	4,803	5,162
MALAYSIA.....	98	125	132	143	145	148
PHILIPPINES.....	483	550	575	600	690	750
PORTUGUESE TIMOR 4/	68	65	75	-	-	-
Vietnam.....	46	60	45	70	70	70
YEMEN, ARAB REP.....	49	45	50	50	50	50
<b>TOTAL ASIA.....</b>	<b>4,829</b>	<b>5,977</b>	<b>6,891</b>	<b>7,493</b>	<b>8,258</b>	<b>8,340</b>
<b>OCEANIA:</b>						
NEW CALEDONIA.....	26	25	25	25	25	25
PAPUA NEW GUINEA.....	593	642	767	730	820	840
<b>TOTAL OCEANIA.....</b>	<b>619</b>	<b>667</b>	<b>792</b>	<b>755</b>	<b>845</b>	<b>865</b>
<b>WORLD TOTAL.....</b>	<b>74,335</b>	<b>61,399</b>	<b>71,119</b>	<b>78,809</b>	<b>81,408</b>	<b>80,670</b>

—Denotes negligible, unknown, or not available.

1/ Coffee marketing year begins about July in some countries and in others about October. 2/ 132.276 pounds. 3/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1980 in that country is shown as production for the 1980/81 marketing year. In Ecuador, however, this is referred to as the 1979/80 crop. 4/ Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements. Also, due to rounding, country totals may not add to area and world totals.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachments and Foreign Service Officers, results of office research, and related information.

TABLE 2--COFFEE: GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1971/72-1975/76, ANNUAL 1976/77-1980/81<sup>1</sup>/

REGION AND COUNTRY	AVERAGE 1971/72-1975/76	1976/77	1977/78	1978/79	1979/80	1980/81
<b>NORTH AMERICA:</b>						
COSTA RICA.....	1,255	1,147	1,264	1,533	1,296	1,557
CUBA.....	--	--	--	--	--	--
DOMINICAN REPUBLIC.....	577	482	755	487	604	560
EL SALVADOR.....	2,452	2,588	2,510	2,991	2,922	2,296
GUATEMALA.....	1,931	1,915	2,236	2,517	2,332	2,275
HAITI.....	35	270	304	228	444	260
HONDURAS.....	632	587	929	1,023	1,111	1,153
JAMAICA.....	9	6	16	5	22	14
MEXICO.....	2,194	2,080	2,001	3,034	2,320	2,200
NICARAGUA.....	616	774	887	921	924	965
PANAMA.....	15	13	34	40	42	57
IRINIDAO-TDEAGO.....	36	45	27	24	20	16
US-HAWAII.....	--	--	--	--	--	--
US-PUERTO RICO.....	--	--	--	--	--	--
<b>TOTAL NORTH AMERICA.....</b>	<b>10,671</b>	<b>9,907</b>	<b>10,963</b>	<b>12,803</b>	<b>11,957</b>	<b>11,353</b>
<b>SOUTH AMERICA:</b>						
BOLIVIA.....	73	80	87	89	103	111
BRAZIL.....	15,114	1,800	10,000	12,000	14,000	13,500
COLOMBIA.....	6,806	7,900	9,500	10,970	10,962	10,775
ECUADOR 3/.....	990	1,515	1,107	1,630	1,284	1,210
GUAYANA.....	--	--	--	--	2	--
PARAGUAY.....	74	15	45	117	9	47
PERU.....	787	697	800	880	1,015	840
VENEZUELA.....	290	189	271	178	62	115
<b>TOTAL SOUTH AMERICA.....</b>	<b>24,133</b>	<b>12,196</b>	<b>21,810</b>	<b>25,864</b>	<b>27,437</b>	<b>26,598</b>
<b>AFRICA:</b>						
ANGOLA.....	3,014	1,059	972	568	220	265
BENIN.....	28	16	2	4	4	4
BURUNDI.....	370	357	282	384	463	330
CAMEROON.....	1,447	1,281	1,344	1,599	1,628	1,648
CENTRAL AFRICAN REPUBLIC.....	62	155	153	168	201	218
CONGO, BRAZZAVILLE.....	15	32	45	106	42	57
EQUATORIAL GUINEA.....	97	80	70	80	90	90
ETHIOPIA.....	1,056	1,049	1,354	1,342	1,255	1,250
GABON.....	6	6	2	5	7	7
GHANA.....	49	55	22	23	30	25
GUINEA.....	54	33	10	53	28	64
IVOIRE COAST.....	4,084	4,782	3,357	4,911	4,010	4,435
KENYA.....	1,147	1,644	1,367	1,181	1,377	1,344
LIBERIA.....	72	146	126	133	136	123
MADAGASCAR.....	979	851	1,152	578	1,195	1,334
NIGERIA.....	8	--	--	--	--	--
RWANDA.....	359	529	360	309	499	525
SIERRA LEONE.....	106	163	72	225	167	175
TANZANIA.....	861	780	814	836	789	835
TOGO.....	158	176	81	104	172	159
UGANDA.....	3,151	2,634	1,838	1,793	2,052	1,970
ZAIRE (CONGO-K).....	1,216	1,270	254	1,100	1,100	1,205
<b>TOTAL AFRICA.....</b>	<b>18,462</b>	<b>17,098</b>	<b>14,377</b>	<b>15,160</b>	<b>15,625</b>	<b>15,913</b>
<b>ASIA:</b>						
INDIA.....	782	963	1,233	1,034	1,667	1,245
INDONESIA.....	1,605	2,319	2,886	3,738	3,723	4,062
MALAYSIA.....	7	28	--	--	--	--
PHILIPPINES.....	47	242	250	242	300	342
PORTUGUESE TIMOR 4/.....	59	55	65	30	35	35
VIETNAM.....	26	39	30	35	40	40
YEMEN, ARAB REP.....	39	35	40	40	40	40
<b>TOTAL ASIA.....</b>	<b>2,565</b>	<b>3,672</b>	<b>4,504</b>	<b>5,089</b>	<b>5,765</b>	<b>5,724</b>
<b>OCEANIA:</b>						
NEW CALEDONIA.....	16	15	14	14	14	14
PAPUA NEW GUINEA.....	562	627	752	715	804	824
<b>TOTAL OCEANIA.....</b>	<b>598</b>	<b>642</b>	<b>766</b>	<b>729</b>	<b>818</b>	<b>838</b>
<b>WORLD TOTAL.....</b>	<b>55,828</b>	<b>43,516</b>	<b>52,420</b>	<b>59,645</b>	<b>61,602</b>	<b>60,426</b>

--Denotes negligible, unknown, or available.

<sup>1/</sup> Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. <sup>2/</sup> 132,276 pounds. <sup>3/</sup> As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1980 in that country is shown as production for the 1980/81 marketing year. In Ecuador, however, this is referred to as the 1979/80 crop. <sup>4/</sup> Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements. Also, due to rounding, country totals may not add to area and world totals.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attachments and Foreign Service Officers, results of office research, and related information.

TABLE 3—WORLD COFFEE SUPPLY AND DISTRIBUTION, 1960-1981

(IN 1,000 60-KG BAGS)

COUNTRY BY TIME PERIOD	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	DOMESTIC USE	EXPORTS		ENDING STOCKS
						DISTRIBUTION	BEANS	
<hr/>								
WORLD TOTAL								
1960/61*	58,806	65,374	215	124,395	16,270	42,846	63	92
1961/62*	65,123	75,950	191	141,264	20,985	45,059	56	135
1962/63*	74,128	67,787	162	142,077	14,591	46,778	42	123
1963/64*	80,538	65,338	91	145,967	17,524	50,883	69	118
1964/65*	77,371	52,649	89	130,109	16,650	41,765	58	78
1965/66*	71,556	82,153	144	153,853	17,697	49,669	37	257
1966/67*	86,188	63,380	158	149,726	19,128	48,324	26	564
1967/68*	81,684	70,877	155	152,716	17,950	54,935	55	741
1968/69*	79,059	63,316	125	144,480	19,528	52,542	76	963
1969/70*	69,713	181	139,264	18,791	53,875	84	1,161	55,119
1970/71*	58,979	179	124,512	19,270	50,280	107	1,253	51,641
1971/72*	53,604	73,579	211	127,494	18,954	56,431	258	1,589
1972/73*	50,259	77,133	206	127,598	17,366	58,723	381	2,045
1973/74*	49,086	66,115	288	115,489	19,022	58,080	163	2,149
1974/75*	36,076	82,379	293	118,748	19,138	53,100	240	1,985
1975/76*	44,284	72,669	246	116,899	18,786	56,746	394	2,164
1976/77*	38,809	61,400	246	100,455	18,014	54,476	306	2,224
1977/78*	25,483	71,119	294	96,896	18,809	47,322	175	893
1978/79*	29,638	78,809	276	100,783	19,332	61,429	169	2,30
1979/80*	25,424	81,408	300	107,132	19,982	59,261	176	2,452
1980/81*	25,259	80,670	306	106,235	20,423	57,992	178	3,082
								61,235
								24,577

NOTE: TOTAL MAY NOT ADD BECAUSE OF ROUNDING. -- DENOTES UNAVAILABLE, NEGIGLIGIBLE, OR ZERO

Table 4--GREEN COFFEE: U.S. IMPORTS, BY COUNTRY OF ORIGIN,  
QUANTITY AND VALUE, 1979 AND 1980

Continent and Country	:	1979	:	1980	1/
	:	60 Kg Bags 2/	:	60 Kg Bags	:
	:	1,000 Dollars	:	1,000 Dollars	
North America:	:				
Costa Rica.....	515,699	109,177	297,533	59,883	
Dominican Republic.....	548,009	124,705	342,623	62,280	
El Salvador.....	1,123,406	212,821	1,373,720	261,298	
Guatemala.....	1,267,598	252,297	926,292	196,048	
Haiti.....	32,146	6,192	54,523	9,723	
Honduras.....	547,084	101,352	333,227	73,618	
Mexico.....	1,934,418	391,660	1,336,828	280,131	
Nicaragua.....	193,944	35,733	136,787	30,860	
Panama.....	28,689	5,833	42,786	9,834	
Trinidad and Tobago.....	2,690	445	1,367	264	
Other.....	4,652	1,055	398	148	
Total North America.....	6,198,335	1,241,270	4,846,084	984,087	
South America:	:				
Brazil.....	1,890,483	388,537	3,505,180	865,853	
Colombia.....	3,890,865	785,062	3,403,819	764,731	
Ecuador.....	638,057	128,729	539,354	97,125	
Peru.....	954,493	197,825	565,283	113,709	
Venezuela.....	121,010	19,891	34,666	8,036	
Other.....	789,411	151,641	206,318	39,710	
Total South America.....	8,284,319	1,671,685	8,254,520	1,889,164	
Africa:	:				
Angola.....	40,052	6,698	119,515	25,623	
Burundi.....	195,246	36,259	182,980	39,794	
Cameroon.....	182,559	32,528	199,100	41,554	
Ethiopia.....	549,166	104,896	405,885	83,736	
Ivory Coast.....	833,920	154,337	438,066	88,962	
Kenya.....	57,848	11,812	59,453	11,195	
Madagascar.....	261,403	45,752	305,174	60,643	
Rwanda.....	167,409	37,713	287,162	62,315	
Tanzania.....	172,280	30,074	62,635	12,194	
Uganda.....	360,763	81,732	631,454	125,619	
Zaire.....	84,396	16,906	151,409	28,863	
Other.....	179,528	34,728	125,936	24,064	
Total Africa.....	3,084,570	593,435	2,968,769	604,562	
Asia and Oceania:	:				
India.....	297,592	55,423	222,937	42,760	
Indonesia.....	1,294,186	209,588	1,314,563	229,595	
Papua New Guinea.....	103,538	22,099	94,573	19,091	
Other.....	104,814	17,879	185,305	33,705	
Total Asia and Oceania.....	1,800,130	304,989	1,817,378	325,151	
Other Countries.....	28,729	7,597	266,197	69,695	
Grand Total.....	19,396,083	3,818,976	18,153,048	3,872,659	

1/ Preliminary. 2/ 132,276 pounds each.

Source: Compiled from U.S. Department of Commerce, Bureau of Census data.

April 1981

Commodity Programs, FAS/USDA

Table 5--GREEN COFFEE: U.S. GROSS IMPORTS FOR CONSUMPTION BY MONTHS, 1976-80  
(In 60 kilogram bags)

Month	1976	1977	1978	1979	1980 1/
January.....	1,664,327	1,994,147	1,682,045	1,747,330	2,020,173
February.....	1,743,777	1,706,674	1,574,583	1,353,257	1,366,172
March.....	2,311,082	1,839,178	1,707,452	1,630,811	1,420,672
April.....	1,636,324	1,824,133	1,556,739	2,036,535	1,642,305
May.....	1,546,394	1,223,533	1,345,237	1,618,619	1,566,286
June.....	1,863,977	1,136,816	1,249,290	1,617,283	1,663,358
January-June.....	10,765,881	9,724,481	9,115,346	10,003,835	9,678,966
July.....	1,909,138	755,821	1,315,844	1,596,934	1,533,391
August.....	1,636,634	695,029	1,123,721	1,404,349	1,385,806
September.....	956,398	678,095	1,337,360	1,631,848	1,062,275
October.....	1,012,923	635,077	1,901,294	1,273,073	1,291,583
November.....	1,648,566	971,964	1,688,512	1,592,806	1,485,956
December.....	1,858,301	1,347,223	1,650,700	1,893,238	1,715,071
July-December.....	9,021,960	5,083,209	9,017,431	9,392,248	8,474,082
Calendar year.....					
Total.....	19,787,841	14,807,690	18,132,777	19,396,083	18,153,048
ICO year 2/.....	19,938,313	16,373,216	15,846,535	19,877,472	18,419,555

1/ Preliminary. 2/ Year ending September 30 of year shown; ICO is International Coffee Organization.

Source: Compiled from U.S. Department of Commerce, Bureau of Census data.

April 1981

Commodity Programs, FAS/USDA

Table 6--GREEN COFFEE: U.S. GROSS IMPORTS BY COUNTRY OR AREA OF ORIGIN  
AVERAGE 1971-75, ANNUAL 1976-80

	Average 1971-75	1976	1977	1978	1979	1980 1/
	Mil. bags 2/ cent					
Brazil.....	4.65	22	3.09	16	2.45	17
Africa and Asia....	7.58	37	7.29	37	4.60	31
Europe.....	.05	3/	.03	3/	.02	3/
Mild Coffee:						
Colombia.....	2.94	14	2.69	13	1.95	13
Other South America.....	1.21	6	1.52	8	1.15	8
Mexico and Central America.....	3.77	18	4.40	22	3.96	27
Caribbean.....	.56	3	.76	4	.68	4
Total Milds.....	8.48	41	9.37	47	7.74	52
Total World....	20.76	100	19.78	100	14.81	100

1/ Preliminary. 2/ 60 kilogram bags of 132.276 pounds each. 3/ Less than one-half of one percent.

Source: Compiled from U.S. Department of Commerce, Bureau of Census data.

Table 7--COFFEE: UNITED STATES TRADE, QUANTITY AND VALUE, 1976-1980

	1976		1977		1978		1979		1980	
	Bags 1/	Dollars								
<b>Imports</b>										
Green.....	19,788	2,633,207	14,808	3,860,998	18,133	3,728,299	19,396	3,818,976	18,153	2,821,291
Roasted 2/.....	372	46,479	450	98,660	414	70,264	508	81,622	353	72,239
Soluble 2/.....	1,550	177,585	1,260	282,485	1,226	235,796	1,517	255,168	1,245	236,933
Total.....	21,710	2,857,271	16,518	4,242,143	19,773	4,034,359	21,421	4,155,766	19,751	3,130,463
<b>Exports</b>										
Green.....	120	16,664	171	23,154	146	35,511	88	18,366	31	8,314
Roasted 2/.....	122	20,818	209	31,707	119	39,365	121	38,255	163	52,648
Soluble 2/.....	114	15,100	138	25,350	163	39,204	387	88,138	266	63,610
Total.....	356	52,582	518	80,211	428	114,080	596	144,759	460	124,572
<b>Reexports</b>										
Green.....	905	131,019	1,404	362,009	717	163,144	1,110	247,561	1,106	245,317
Roasted 2/.....	24	4,061	24	4,105	11	3,419	8	2,797	32	11,111
Soluble 2/.....	47	5,583	43	10,069	42	7,021	67	12,051	44	8,338
Total.....	976	140,663	1,471	376,183	770	173,584	1,185	262,409	1,182	264,766

1/ 60 kilogram bags of 132.276 pounds each. 2/ Converted to bags of green bean equivalent (GBE) at 1.19 pounds green to 1 pound roasted and 3.0 pounds green to 1 pound soluble.

Source: Compiled from U.S. Department of Commerce, Bureau of Census data.

April 1981

Commodity Programs, FAS/USDA

Table 8--ICO COMPOSITE DAILY INDICATOR PRICE (1976 AGREEMENT)  
(U.S. CENTS PER POUND EQUIVALENT)

Date	October			November			December			January			February			March		
	20-day:			20 d-y:			20-day:			20-day:			20-day:			20-day:		
	Daily	moving	average	Daily	moving	average	Daily	moving	average	Daily	moving	average	Daily	moving	average	Daily	moving	average
1...:	121.84	125.42	-	-	118.29	116.17	-	-	-	-	121.17	124.71	119.75	120.15	-	-	-	
2...:	122.00	125.24	-	-	117.84	115.86	-	-	-	-	120.29	124.39	119.79	120.09	-	-	-	
3...:	125.29	125.17	122.00	126.21	121.34	115.82	-	-	-	-	118.17	124.00	120.09	120.08	-	-	-	
4...:	-	-	-	120.42	115.73	115.72	125.59	120.34	119.42	123.73	119.63	120.09	-	-	-	-	-	
5...:	-	-	-	122.25	126.14	119.50	126.59	120.60	119.75	123.43	119.38	120.15	-	-	-	-	-	
6...:	122.00	124.81	119.71	125.84	-	-	126.04	120.88	-	-	-	-	-	-	-	-	-	
7...:	123.54	124.36	115.84	125.37	-	-	119.00	115.88	124.84	121.15	-	-	-	-	-	-	-	
8...:	124.79	124.00	-	-	118.29	116.34	125.75	121.49	119.84	123.07	118.29	120.07	-	-	-	-	-	
9...:	126.17	123.87	-	-	119.29	116.73	-	-	-	-	120.21	122.64	118.04	119.96	-	-	-	
10...:	127.17	123.98	110.04	124.52	119.29	116.73	-	-	-	-	119.57	122.20	117.79	119.86	-	-	-	
11...:	-	-	110.54	123.65	115.54	116.87	-	-	-	-	120.25	121.80	117.46	117.46	-	-	-	
12...:	-	-	113.88	122.93	114.84	116.81	127.00	121.87	-	-	128.75	122.40	121.45	118.21	119.65	-	-	
13...:	127.92	124.26	113.71	122.08	-	-	128.50	123.04	-	-	-	-	-	-	-	-	-	
14...:	128.29	124.42	112.71	121.20	-	-	117.59	117.11	128.17	123.71	-	-	-	-	-	-	-	
15...:	130.67	124.72	-	-	118.75	117.57	127.86	124.22	-	-	-	-	118.50	119.53	-	-	-	
16...:	130.25	124.97	-	-	120.26	119.59	117.89	-	-	-	120.57	121.15	117.42	119.38	-	-	-	
17...:	128.42	125.17	109.63	119.52	120.25	118.13	-	-	-	-	119.42	120.75	118.42	119.33	-	-	-	
18...:	-	-	113.21	119.52	-	-	118.27	126.69	124.62	120.25	120.53	120.17	119.32	-	-	-	-	
19...:	-	-	115.50	118.95	119.19	-	-	-	-	-	127.46	125.02	120.34	120.31	119.67	119.29	-	
20...:	128.09	125.21	116.29	118.47	-	-	-	-	-	-	-	-	-	-	-	-	-	
21...:	126.88	125.29	117.42	118.16	-	-	124.63	125.23	-	-	-	-	-	-	-	-	-	
22...:	125.88	125.34	-	-	120.94	118.45	122.25	125.51	-	-	-	-	-	-	-	-	-	
23...:	123.67	125.42	-	-	121.96	118.73	122.38	125.58	120.75	121.09	120.26	122.34	119.41	-	-	-	-	
24...:	124.92	125.62	116.21	117.72	123.63	119.08	-	-	-	-	121.29	120.31	122.34	119.46	-	-	-	
25...:	-	-	116.63	117.20	-	-	-	-	-	-	-	-	-	-	-	-	-	
26...:	-	-	117.34	116.79	-	-	-	-	-	-	120.34	125.50	119.92	120.28	-	-	-	
27...:	127.00	125.81	-	-	-	-	-	-	-	-	120.34	125.34	120.09	120.26	-	-	-	
28...:	125.50	126.01	118.09	116.47	-	-	-	-	-	-	120.46	125.16	-	-	-	-	-	
29...:	124.63	126.15	-	-	124.13	119.42	-	-	-	-	120.54	125.01	-	-	-	-	-	
30...:	124.25	126.27	-	-	123.54	119.70	121.84	-	-	-	124.93	-	-	-	-	-	-	
31...:	124.09	126.21	-	-	123.42	119.95	-	-	-	-	124.80	123.58	120.18	121.87	-	-	-	
Ave.:	125.79	125.12	115.61	121.66	-	-	119.87	117.44	-	-	-	-	-	-	-	-	-	

Note: Dashes denote weekends and holidays.

TABLE 9  
COFFEE YEAR 1980/81  
ANNUAL AND QUARTERLY QUOTAS  
(60 kilo bags)

Exporting Member	Annual quota 1/	Quarterly quotas				
		Oct.-Dec. 1980 2/		Jan.-March 1981 3/	April-June 1981	July-Sept. 1981
		(1)	(2)	(3)	(4)	(5)
<b>TOTAL</b>	<b>54 770 376</b>	<b>13 220 806</b>	<b>13 383 901</b>	<b>14 092 833</b>	<b>14 072 834</b>	
<b>A. Sub-total: Members entitled to a basic quota</b>	<b>52 149 275</b>	<b>12 565 531</b>	<b>12 728 626</b>	<b>13 437 559</b>	<b>13 417 559</b>	
<b>Colombian Milds</b>	<b>10 866 140</b>	<b>2 494 081</b>	<b>2 472 059</b>	<b>2 950 000</b>	<b>2 950 000</b>	
Colombia	8 932 337	2 011 024	2 071 313	2 425 000	2 425 000	
Kenya	1 197 116	317 200	229 916	325 000	325 000	
Tanzania	736 687	165 857	170 830	200 000	200 000	
<b>Other Milds</b>	<b>13 312 693</b>	<b>3 235 637</b>	<b>3 348 056</b>	<b>3 364 500</b>	<b>3 364 500</b>	
Costa Rica	1 379 489	310 983	393 506	337 500	337 500	
Dominican Republic	431 677	120 378	123 299	94 000	94 000	
Ecuador	1 195 556	317 200	293 356	292 500	292 500	
El Salvador	2 117 977	476 841	491 136	575 000	575 000	
Guatemala	1 931 284	435 376	550 908	472 500	472 500	
Honduras	1 012 947	228 055	234 892	275 000	275 000	
India	1 011 891	287 395	218 496	253 000	253 000	
Mexico	2 015 890	456 108	469 782	550 000	550 000	
Nicaragua	739 767	204 897	209 870	160 000	160 000	
Papua New Guinea	644 601	167 894	126 707	175 000	175 000	
Peru	826 614	230 510	236 104	180 000	180 000	
<b>Unwashed Arabicas</b>	<b>15 377 287</b>	<b>3 828 251</b>	<b>3 627 036</b>	<b>3 961 000</b>	<b>3 981 000</b>	
Brazil	14 088 756	3 538 000	3 300 756	3 625 000	3 625 000	
Ethiopia	1 288 531	290 251	326 280	336 000	336 000	
<b>Robustas</b>	<b>12 593 155</b>	<b>3 007 562</b>	<b>3 281 475</b>	<b>3 162 059</b>	<b>3 142 059</b>	
Angola	393 760	136 640	117 120	80 000	60 000	
Indonesia	2 000 750	664 450	683 320	800 000	800 000	
OAMCAF 4/	(6 173 554)	(1 470 056)	(1 678 230)	(1 512 059)	(1 512 059)	
Benin	45 000	45 000	0	0	0	
Cameroun	1 473 767	332 164	404 648	368 478	368 477	
Central African Republic	206 167	51 042	59 208	46 958	46 959	
Congo	35 000	35 000	0	0	0	
Gabon	7 500	7 500	0	0	0	
Ivory Coast	3 239 171	730 028	889 381	809 881	809 881	
Madagascar	898 469	202 492	246 693	224 642	224 642	
Togo	270 000	67 500	78 300	62 100	62 100	
Uganda	1 976 000	488 000	488 000	500 000	500 000	
Zeire	1 103 591	248 786	314 805	270 000	270 000	
<b>B. Sub-total: Members exempt from a basic quota</b>	<b>2 621 099</b>	<b>655 275</b>	<b>655 275</b>	<b>655 274</b>	<b>655 275</b>	
<b>Arabicas</b>	<b>1 812 433</b>	<b>453 109</b>	<b>453 108</b>	<b>453 108</b>	<b>453 108</b>	
Bolivia	102 200	25 550	25 550	25 550	25 550	
Burundi	400 000	100 000	100 000	100 000	100 000	
Haiti	400 000	100 000	100 000	100 000	100 000	
Jamaica 5/	16 000	4 000	4 000	4 000	4 000	
Malawi 5/	7 500	1 875	1 875	1 875	1 875	
Panama 5/	57 400	14 350	14 350	14 350	14 350	
Paraguay 5/	98 000	24 500	24 500	24 500	24 500	
Rwanda	360 000	90 000	90 000	90 000	90 000	
Venezuela	311 333	77 834	77 833	77 833	77 833	
Zimbabwe 5/	60 000	15 000	15 000	15 000	15 000	
<b>Robustas</b>	<b>808 666</b>	<b>202 166</b>	<b>202 167</b>	<b>202 166</b>	<b>202 167</b>	
Ghana 5/	33 333	8 333	8 334	8 333	8 333	
Guinea	83 333	20 833	20 833	20 833	20 834	
Liberia	120 000	30 000	30 000	30 000	30 000	
Nigeria 5/	98 000	24 500	24 500	24 500	24 500	
Philippines	262 500	65 625	65 625	65 625	65 625	
Sierra Leone	175 000	43 750	43 750	43 750	43 750	
Trinidad and Tobago 5/	36 500	9 125	9 125	9 125	9 125	

1/ Initial quota as shown in column (1) of Table 1 of document ED-1017/81 of 6 January 1981 adjusted to reflect the accession of Zimbabwe, the first and second downward adjustments of 1.4 million bags each and the definitive retention of the 2.4 percent conditional part relating to the quarters October-December 1980 and January-March 1981.

2/ See Table 1.

3/ See Annex Table 2.

4/ See footnote to paragraph 9 of document ED-1017/81.

5/ Members which are listed in Annex 1 to the Agreement as exporting less than 100 000 bags per annum are not subject to quarterly quotes. However, in this table, hypothetical quarterly quotas (25 percent for each quarter) have been shown for these Members, except for Benin, Congo and Gabon which are Members of the OAMCAF group for which all matters related to quota are dealt with in accordance with the provisions of paragraph (2) of Article 6 of the Agreement.

Source: ICO Document 1023/81 (E)  
12 March 1981

TABLE 10  
COFFEE YEAR 1980/81  
QUOTAS FOR THE QUARTER JANUARY-MARCH 1981  
(60 kilo bags)

Exporting Member	Deductions for					
	Quarterly quota (1)	Second downward adjustment of quota (2)	Additional export entitlement Oct.-Dec. 1980		Conditional part 2.4%	Revised quarterly quota col. (1)-(2)-(3)-(4)
			177 473	348 408		13 383 901
TOTAL	15 309 782	1 400 000	177 473	348 408	13 383 901	26 604 707
A. Sub-total: Members entitled to a basic quota	16 654 507	1 400 000	177 473	348 408	12 728 626	25 294 157
Colombian Milled	2 950 000	359 459	47 682	70 800	2 472 059	4 986 140
Colombia	2 425 000	295 487		58 200	2 071 313	4 082 337
Kenya	325 000	39 602	47 682	7 800	229 916	567 116
Tanzania	200 000	24 370		4 800	170 830	336 687
Other Milled	4 015 000	440 793	129 791	96 360	3 348 056	6 583 693
Costa Rica	450 000 2/	45 694		10 800	393 506	704 489
Iranian Republic	141 000 2/	14 317		3 364	123 299	243 677
Ecuador	390 000 2/	39 602	47 682	9 360	293 600	610 556
El Salvador	575 000	70 064		13 800	491 136	967 707
Guatemala	630 000 2/	63 972		15 120	550 908	986 284
Honduras	275 000	33 508		6 600	234 892	462 947
India	319 000 3/	33 508	59 340	7 656	218 496	505 891
Mexico	550 000	67 018		13 200	469 782	925 890
Nicaragua	240 000 2/	24 370		5 760	209 870	414 767
Papua New Guinea	175 000	21 324	22 769	4 200	126 707	294 601
Peru	270 000 2/	27 416		6 480	236 104	466 614
Unshaded Arabica	4 003 000	279 892		96 072	3 627 036	7 455 287
Brazil	3 625 000	237 244		87 000	3 300 756	6 838 756
Ethiopia	378 000 4/	42 648		9 072	326 280	616 531
Robusta	3 686 507	319 856		85 176	3 281 475	6 289 037
Angola	120 000 2/	0		2 880	117 120	253 760
Indonesia	800 000	97 480		19 200	683 200	1 346 750
OAMCAF b/	(1 906 507) 2/	(185 821)		(42 456)	(1 678 230)	(3 146 936)
Benin	0				0	45 000
Cameroun	464 601 3/	48 803		11 150	404 668	736 792
Central African Republic	59 208 3/				59 208	110 250
Congo	0				0	35 000
Gabon	0				0	7 500
Ivory Coast	1 021 154 3/	107 265		24 508	889 381	1 619 449
Madagascar	283 244 3/	29 753		6 798	246 693	449 185
Togo	78 300 3/				78 300	145 800
Uganda	500 000	0		12 000	488 000	976 000
Zaire	360 000 2/	36 555		8 640	314 805	563 591
B. Sub-total: Members exempt from a basic quota 8/	655 275	0	0	0	655 275	1 310 550
Arabica	451 108				451 108	906 217
Bolivia	25 550				25 550	51 100
Burundi	100 000				100 000	200 000
Haits	100 000				100 000	200 000
Jamaica	4 000				4 000	8 000
Malawi	1 875				1 875	3 750
Panama	14 350				14 350	28 700
Paraguay	24 500				24 500	49 000
Kuanda	90 000				90 000	180 000
Venezuela	77 833				77 833	155 667
Zimbabwe	15 000				15 000	30 000
Robusta	202 167				202 167	404 333
Ghana	8 334				8 334	16 667
Guinea	20 833				20 833	41 666
Liberia	30 000				30 000	60 000
Nigeria	24 600				24 600	49 000
Philippines	65 625				65 625	131 250
Sierra Leone	43 750				43 750	87 500
Trinidad and Tobago	9 125				9 125	18 250

1/ Column (2) + Column (3) of Table 1

2/ 30 percent of annual quota

3/ 25 percent of annual quota

4/ 27 percent of annual quota

5/ See paragraph 13 of Decisions Adopted number 125 (document ED-1832/80)

6/ See footnote to paragraph 9 of document ED-1017/81

7/ Annual quotas of Benin, Congo and Gabon are included in the quarter October-December 1980 (see Annex Table 4)

8/ 25 percent of the annual quota for Members not subject to quarterly quota. See footnote 5/ of Table 1

Source: ICO Document 1023/81 (E)

March 12 1981

TABLE 11

COFFEE YEAR 1980/81

## RELEASE OF STAMPS FOR THE QUARTER APRIL-JUNE 1981

(60 kilo bags)

Exporting Member	Quarterly quotas 1/ (1)	Amount provisionally withheld for			Amount to be released Col.(1)-(2)-(3) (4)
		Conditional part 2.4x 2/ (2)	Third downward adjustment 3/ (3)		
<b>TOTAL</b>	<b>14 092 833</b>	<b>319 884</b>	<b>1 400 000</b>	<b>12 271 266</b>	
<b>A. Sub-total: Members entitled to a basic quota</b>	<b>13 437 559</b>	<b>319 884</b>	<b>1 400 000</b>	<b>11 717 675</b>	
<b>Colombian Milds</b>	<b>2 950 000</b>	<b>70 800</b>	<b>313 651</b>	<b>2 565 549</b>	
Colombia	2 425 000	58 200	257 831	2 108 969	
Kenya	325 000	7 800	34 555	282 645	
Tanzania	200 000	4 800	21 265	173 935	
<b>Other Milds</b>	<b>3 364 500</b>	<b>80 748</b>	<b>384 621</b>	<b>2 899 131</b>	
Costa Rica	337 500	8 100	39 871	289 529	
Dominican Republic	94 000	2 256	12 492	79 252	
Ecuador	292 500	7 020	36 555	250 925	
El Salvador	575 000	13 800	61 135	500 065	
Guatemala	472 500	11 340	55 820	405 340	
Honduras	275 000	6 600	29 238	239 162	
India	253 000	6 072	29 238	217 690	
Mexico	550 000	13 200	58 477	478 323	
Nicaragua	160 000	3 840	21 265	134 895	
Papua New Guinea	175 000	4 200	18 607	152 193	
Peru	180 000	4 320	23 923	151 757	
<b>Unwashed Arabicas</b>	<b>3 961 000</b>	<b>95 064</b>	<b>422 632</b>	<b>3 443 304</b>	
Brazil	3 625 000	87 000	385 419	3 152 581	
Ethiopia	336 000	8 064	37 213	290 723	
<b>Robustas</b>	<b>3 162 059</b>	<b>73 272</b>	<b>279 096</b>	<b>2 809 691</b>	
Angola	80 000	1 920	0	78 080	
Indonesia	800 000	19 200	85 058	695 742	
OMCAF	(1 512 059)	(33 672)	(162 141)	(1 316 246)	
Benin	0			0	
Cameroon	368 478	8 844	42 584	317 050	
Central African Republic	46 958	0		46 958	
Congo	0			0	
Gabon	0			0	
Ivory Coast	809 881	19 437	33 596	696 848	
Madagascar	224 642	5 391	25 961	193 290	
Togo	62 100	0		62 100	
Uganda	500 000	12 000	0	488 000	
Zaire	270 000	6 480	31 897	231 623	
<b>B. Sub-total: Members exempt from a basic quota</b>	<b>655 274</b>			<b>553 591</b>	
<b>Arabicas</b>	<b>453 108</b>			<b>393 383</b>	
Bolivia	25 550			25 550	
Burundi	100 000			100 000	
Haiti	100 000			100 000	
Jamaica 4/	0			0	
Malawi 4/	1 875			4/	
Panama 5/	14 350			5/	
Paraguay 4/	24 500			4/	
Rwanda	90 000			90 000	
Venezuela	77 833			77 833	
Zimbabwe 4/	15 000			4/	
<b>Robustas</b>	<b>202 166</b>			<b>160 208</b>	
Ghana 4/	8 333			4/	
Guinea	20 833			20 833	
Liberia	30 000			30 000	
Nigeria 4/	24 500			4/	
Philippines	65 625			65 625	
Sierra Leone	43 750			43 750	
Trinidad and Tobago 4/	9 125			4/	

1/ See column (4) of Table 1

2/ See sub-paragraph (b) of paragraph 10 of document ICC-34-6 "Decisions of the International Coffee Council concerning the entry into force of quotas"

3/ See paragraph 13 of document ICC-34-6

4/ Members not subject to quarterly quotas. Stamps needed to cover the annual quota of these Members were released in October 1980

UNITED STATES DEPARTMENT OF AGRICULTURE  
WASHINGTON, D.C. 20260

OFFICIAL BUSINESS  
PENALTY FOR PRIVATE USE, \$300

POSTAGE AND FEES PAID  
U.S. DEPARTMENT OF  
AGRICULTURE



AGR 101  
FIRST CLASS

If you no longer need this publication, check here \_\_\_\_\_ and return this sheet and/or envelope in which it was mailed and your name will be dropped from mailing list.

If your address should be changed \_\_\_\_\_ PRINT OR TYPE the new address, including ZIP CODE and return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 5918 So.  
U.S. Department of Agriculture  
Washington, D.C. 20250